



IMTS Steering Committee Meeting

Draft Illinois Marine Transportation System Plan and Economic Impact Analysis

ISFAC

July 30, 2020



ILLINOIS MARINE TRANSPORTATION SYSTEM PLAN



Illinois Department of Transportation



Agenda

ILLINOIS MARINE TRANSPORTATION SYSTEM PLAN

■ Overview of the IMTS Plan & Key Elements

❖ Commodities

❖ Economic Impacts



THE PLAN IS DIVIDED IN THE FOLLOWING CHAPTERS:

[1]

INTRODUCTION

[2]

HISTORY AND
SYSTEM OVERVIEW

[3]

PUBLIC PORT
DISTRICT PROFILES

[4]

COMMODITY FLOWS
AND ECONOMIC VALUE

[5]

NEEDS ASSESSMENT
AND STRATEGY
DEVELOPMENT

[6]

IMPLEMENTATION





Elements of the Plan

6 Steering Committee Meetings

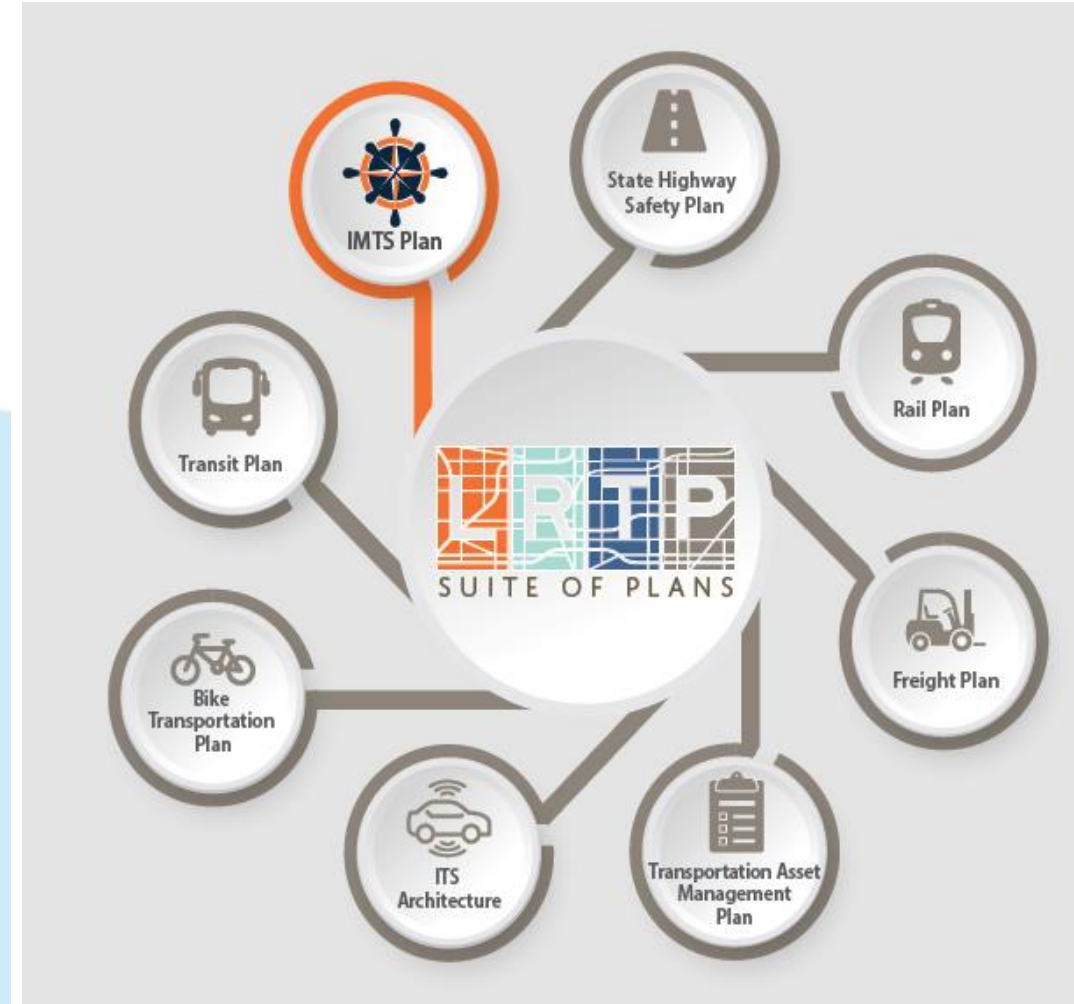
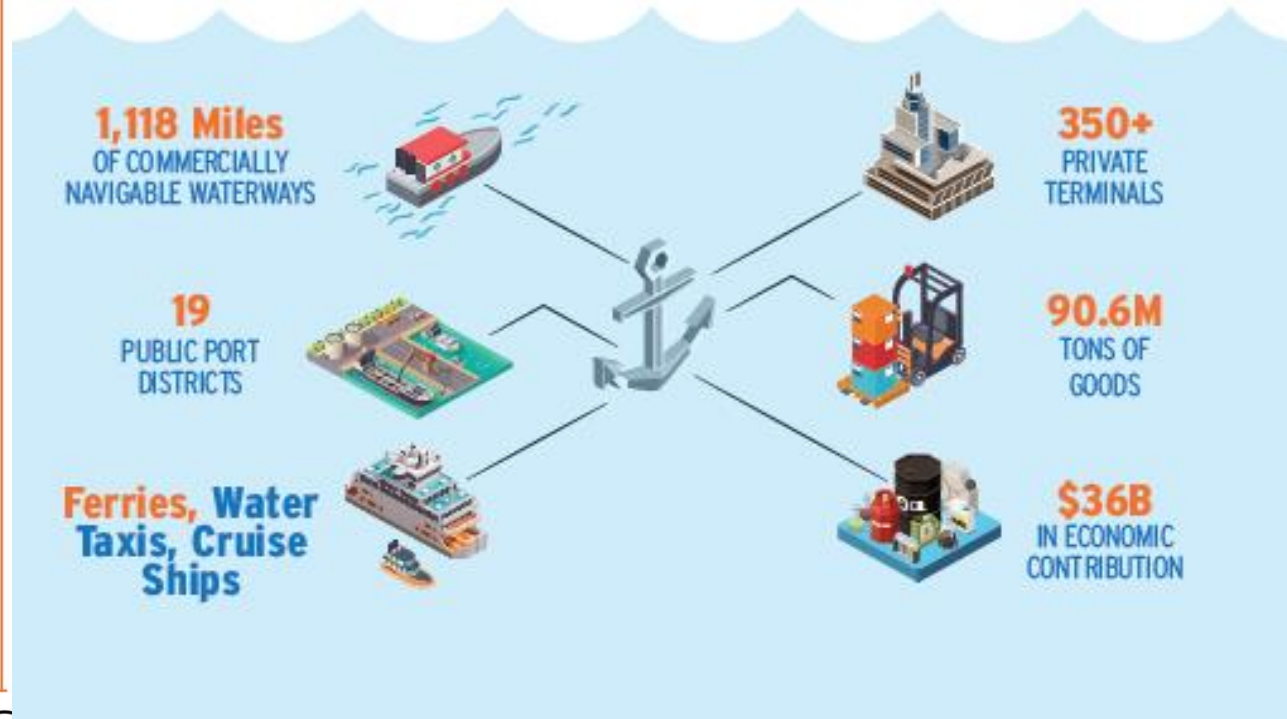
Over 70+ Stakeholder Interviews





Highlights

- 🚢 IDOT's First ever IMTS Plan
- 🚢 Joins other plans as part of the LRTP Suite
- 🚢 Programmatic Recommendations
- 🚢 Implementation Partners



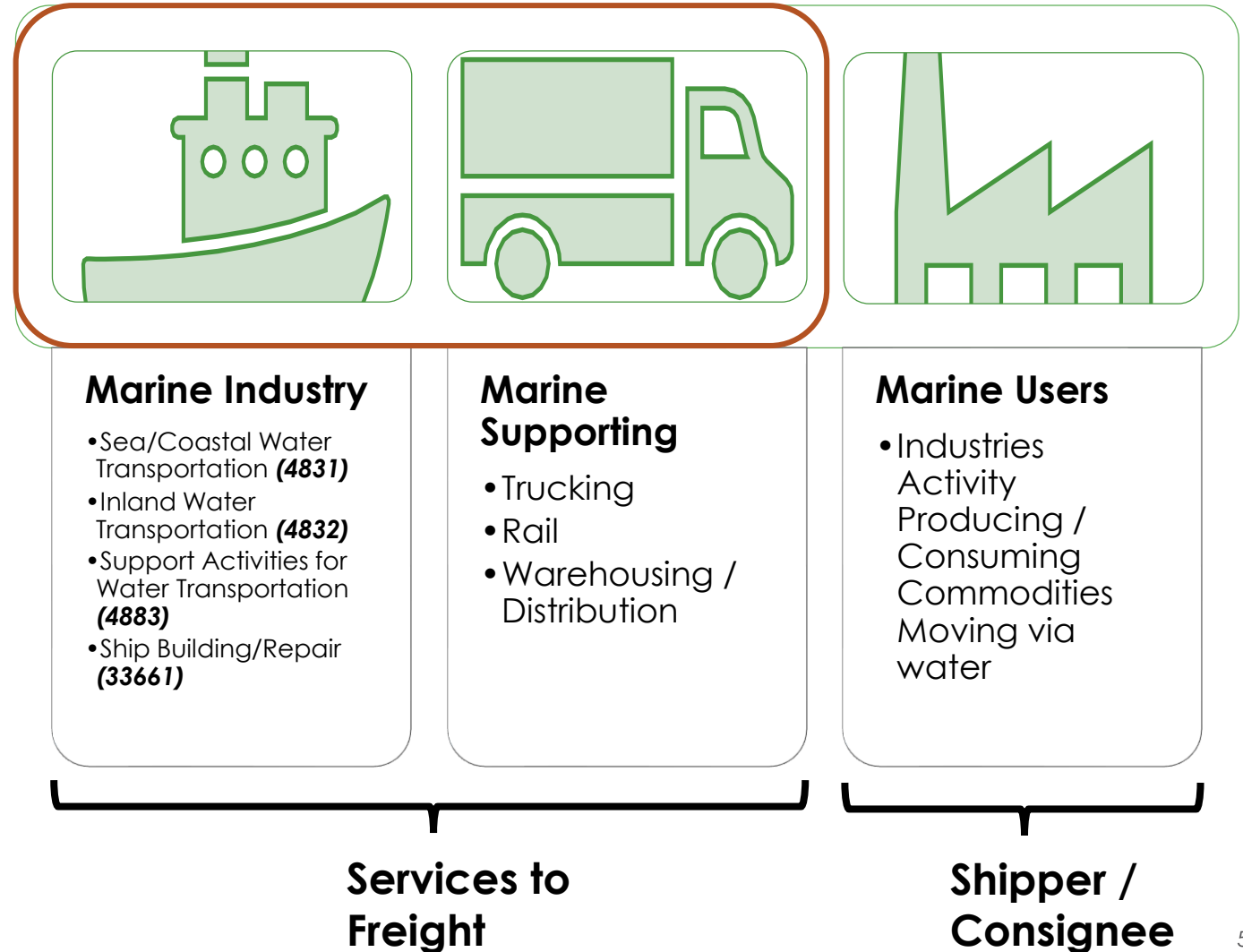


Commodity Flows and Economic Value

- Topics covered
 - » Commodity Flows
 - » Economic Impact
 - » Industry Profiles

90.6 Million Tons Moved Annually or 9% of Total State Freight Tonnage

\$36 Billion in Economic Contribution to the State

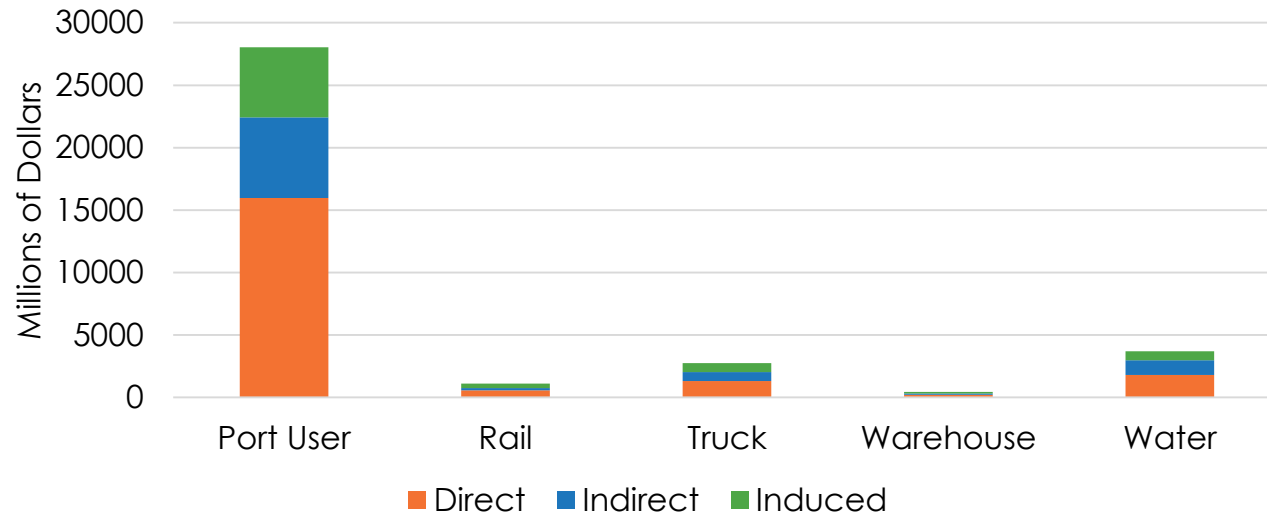




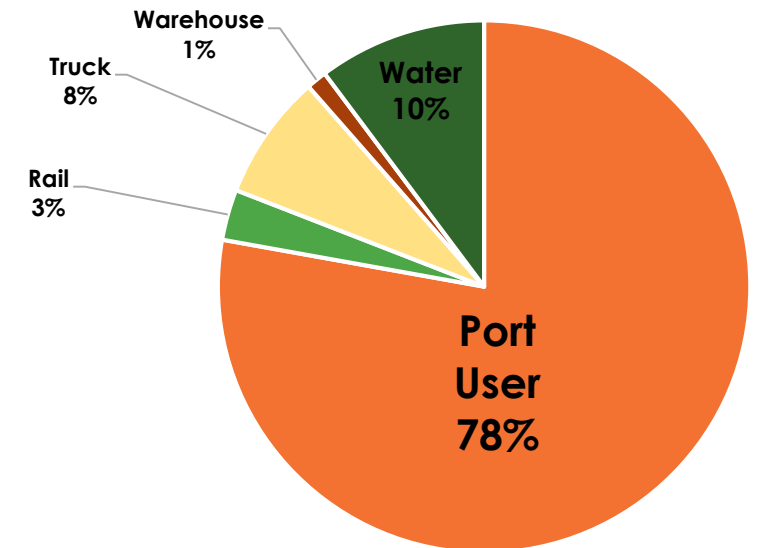
Commodity Flows and Economic Value

Impact Type	Direct Impact				Total Impact			
	Employment	Income (\$M)	Value Added (\$M)	Output (\$M)	Employment	Income (\$M)	Value Added (\$M)	Output (\$M)
Port User	59,372.9	3,681.5	6,216.1	15,968.5	127,481.4	7,815.2	13,286.5	28,035.3
Rail	1,704.7	302.4	368.1	564.1	4,913.2	489.8	689.3	1,109.8
Truck	8,015.9	513.4	617.8	1,314.0	16,581.8	1,013.2	1,472.5	2,749.3
Warehouse	1,831.0	117.9	140.0	216.4	3,299.3	198.6	283.1	446.5
Water	3,757.7	301.2	539.0	1,790.7	14,353.2	966.2	1,629.7	3,683.4
Total	74,682.2	4,916.4	7,880.9	19,853.6	166,628.9	10,483.1	17,361.1	36,024.4

Composition of Total Impacts
(Economic Output)



Total Output by Activity (\$M)

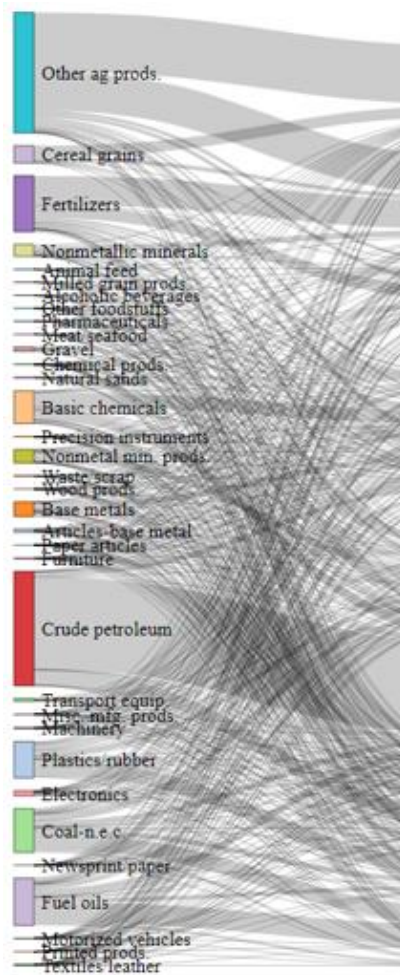




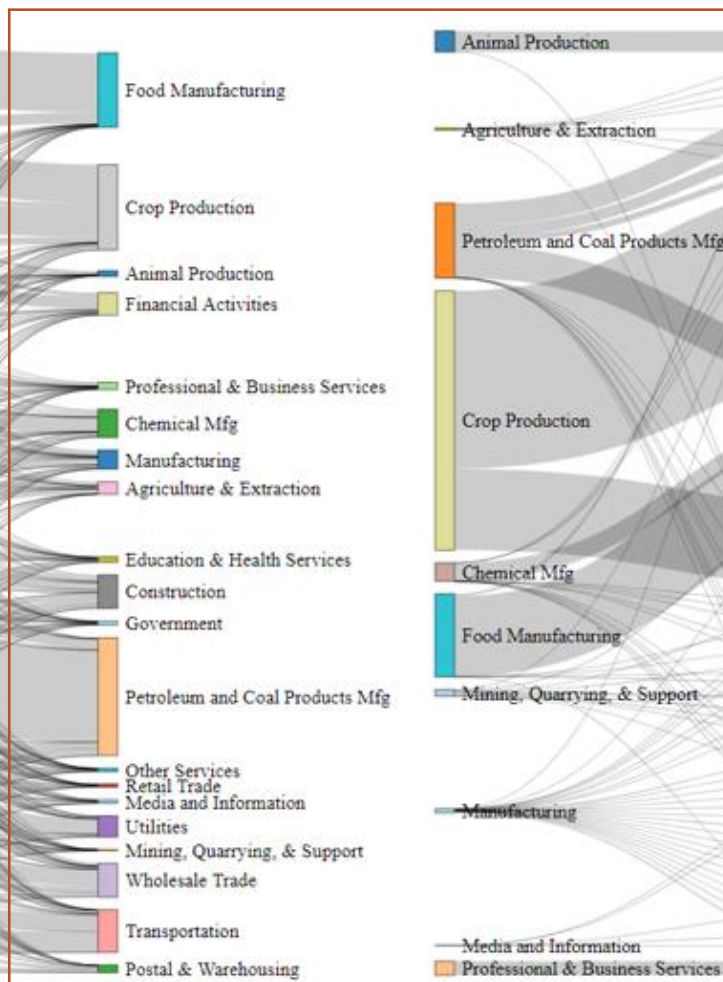
Commodity Flows and Economic Value

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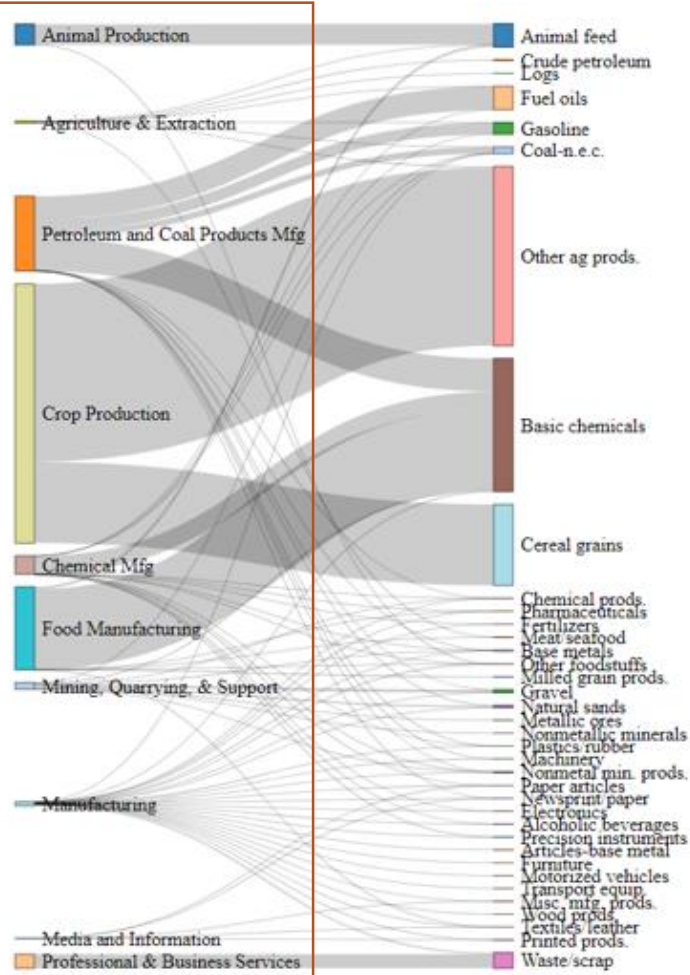
Inbound Freight



Illinois Industries

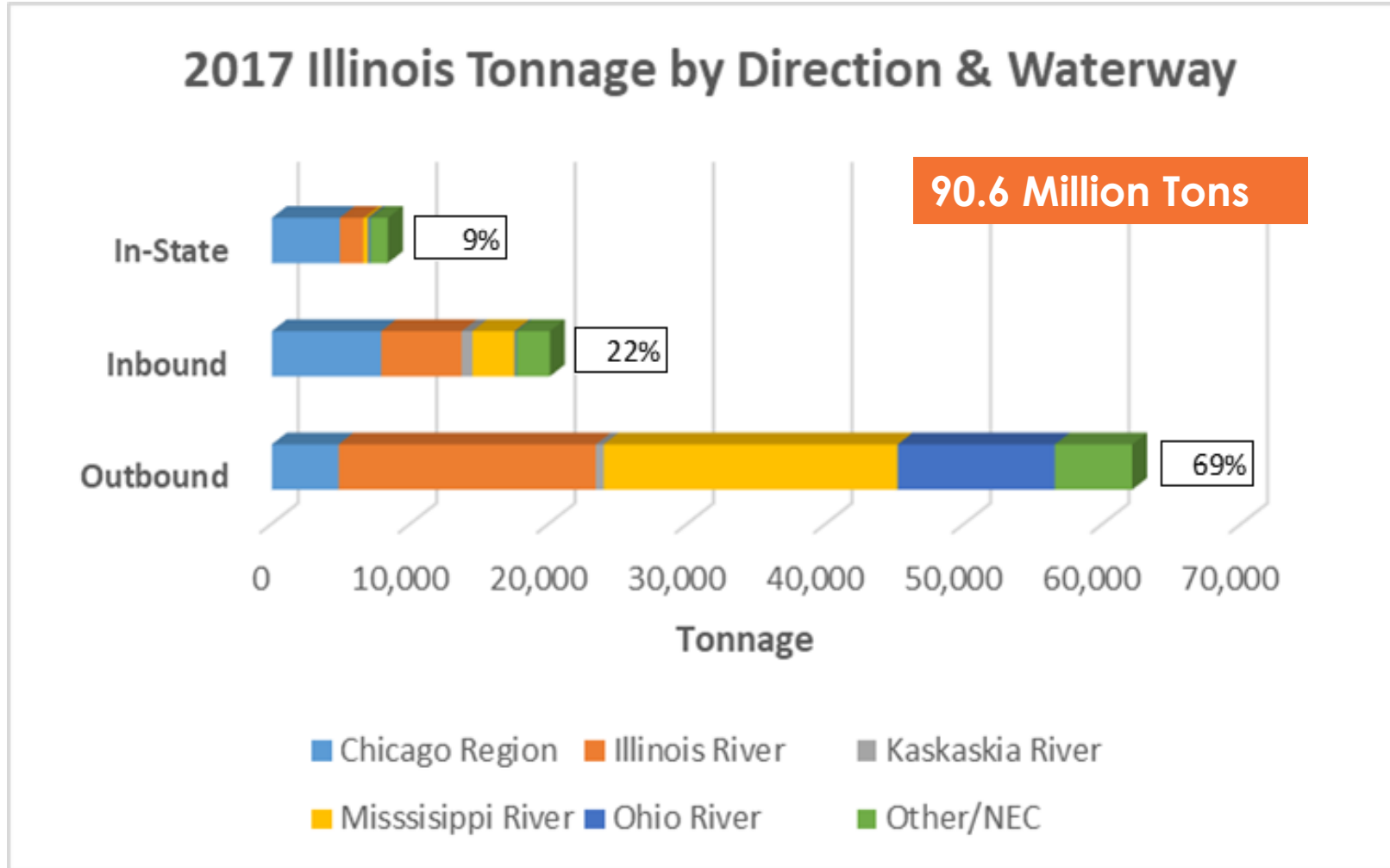


Outbound Freight





Illinois Waterways 2017 Freight Tonnage



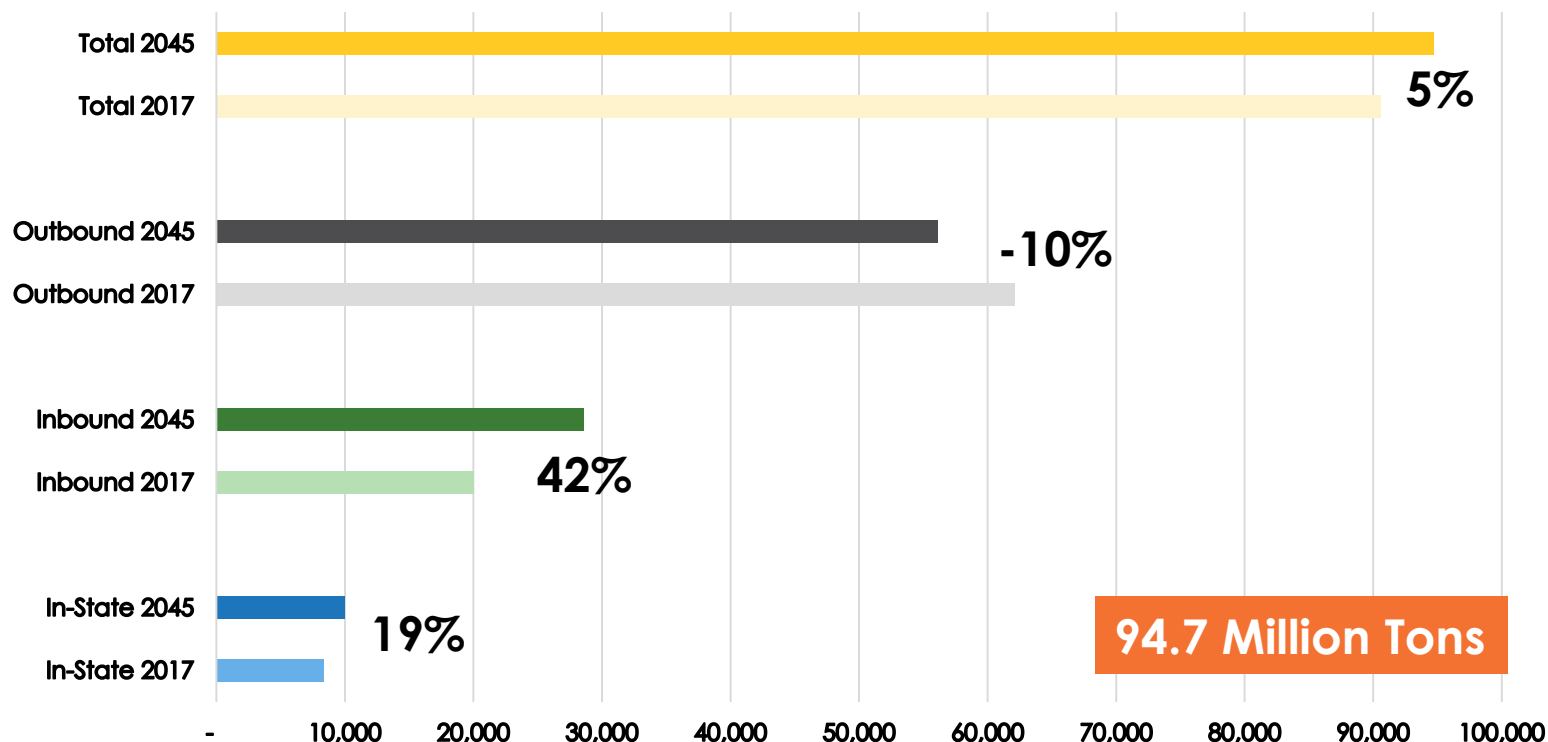
- Two-thirds outbound
- Mississippi and Illinois River volumes roughly equal
- Chicago Region particularly significant for in-state
- Ohio River mainly outbound



Illinois Waterway 2045 Freight Forecast

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Forecast Tonnage Growth by Direction

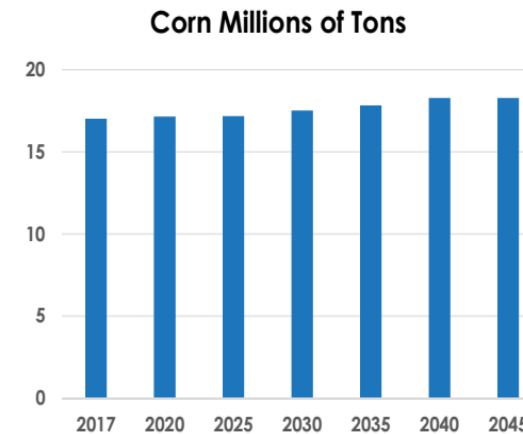
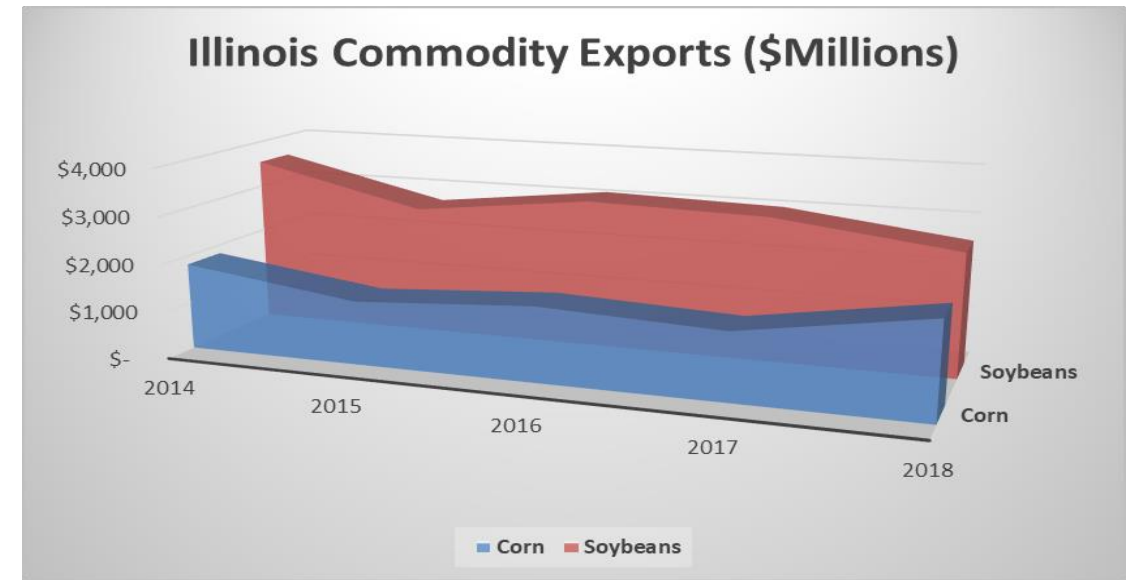


- 4 million ton net gain
- Loss in outbound freight offset elsewhere
- Outbound decline is mainly in coal
- Ohio River loses most traffic: ↓ 31%
- Chicago Region gains most: ↑ 37%

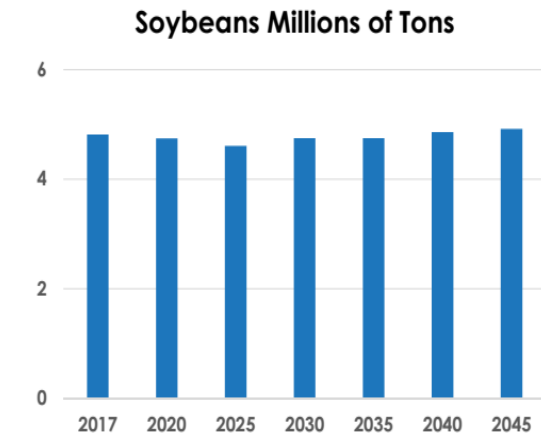


Food Products Outlook

- Food products are #1 on IMTS and mainstay of outbound volume: 56 percent in 2017
- Two-thirds of food is corn and soybeans
- Volatile export market is key driver of volume for top commodity group on IMTS
- 2045 forecast expects continuing, moderate growth



Growth Through 2045: **7.5%**



Growth Through 2045: **2.2%**



Industry Profiles

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Food Products

- Main product is **corn** and **soybeans**
- Farm and food manufacturing **13.7%** of State **GDP**
- **97%** of outbound shipments of food product traveled to Louisiana
- **Corn**
 - » **25%** of state output went to export in 2018
- **Soybeans**
 - » **40%** of state output went to export in 2018

Coal

- **15%** of nation's economically recoverable coal reserves are in Illinois
- Illinois' utilities consume **20%** of states coal output
- **25%** of Illinois' coal output goes to export
- Public utilities in **8 states** received Illinois coal by water in 2018, accounted for **95% of waterborne coal shipments**

Primary Metal Products

- Main products are **iron** and **steel**
- Primary metal manufacturing represents **2%** of the private goods producing sector in 2017 **Illinois GDP**
- Fabricated metals manufacturing represent more than **7%** of **Illinois GDP**
- **Several thousand** metal fabrication facilities within **three miles of the IMTS**, employing **over 12 thousand people**.





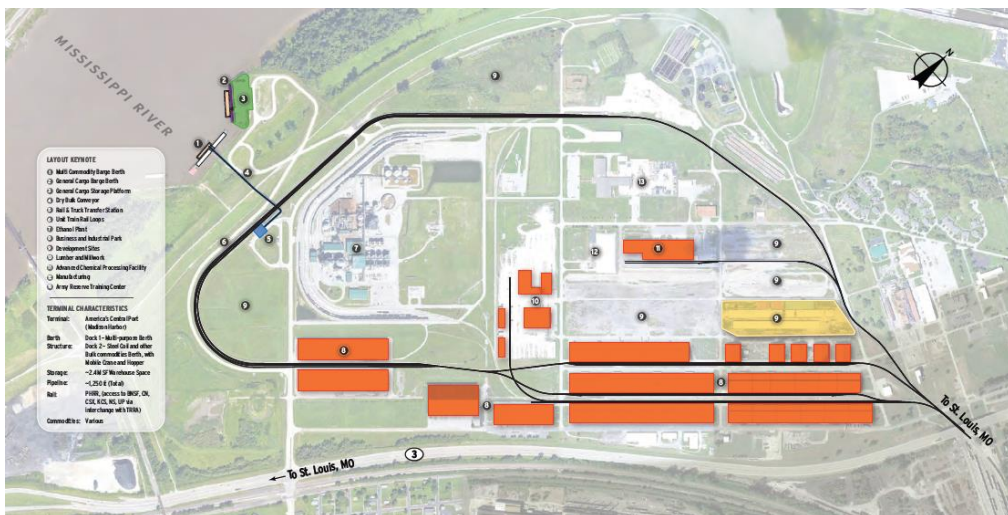
Port District Profiles

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■ Port District Specific

- » 19 Port Districts
- » Multimodal connections, terminal information economic value, commodity flows, port owned property

Port Owned Property Overview



Top Commodities



District Commodities Volume

2017 Commodities by County* (inbound, outbound, in-state):

MADISON COUNTY
4.2 MILLION TONS

JERSEY COUNTY
14 MILLION TONS

*Note: America's Central Port District does not encompass the entirety of the listed counties.

Economic Value

	PORT USER	MARINE INDUSTRY	MARINE SUPPORTING	TOTAL
Employment	9,009	1,051	1,921	11,980
Income	\$557.6M	\$70.5M	\$117.7M	\$765.5M
Value Added	\$947.9M	\$117.7M	\$196.9M	\$1,262.5M
Output	\$1,982.3M	\$265.8M	\$343.4M	\$2,591.5M





Needs Assessment and Strategy Development

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- Provides an analysis of the needs and strategies for the IMTS
- Topics covered
 - » Peer State and Neighbor State Review
 - ✓ MTS Planning and Funding Programs
 - ✓ Dredging Programs
 - » Critical Needs of the IMTS and Its Stakeholders
 - » Programmatic Recommendations
 - » Benefits of Action

FIGURE 5.2 Case Study Highlights – Maritime Staff and/or Dedicated Section



FIGURE 5.3 Case Study Highlights – Integration of Maritime Planning





Programmatic Recommendations

- Create a Marine Section within IDOT with dedicated staff
- Formally “integrate marine” as a mode within IDOT
- Formally “integrate marine” throughout the State of Illinois
- Develop Illinois marine system funding program
- Use existing funding sources to address marine needs
- Streamline processes for port activity permitting, dredging and making beneficial use of dredged materials
- Re-evaluate the Port District Structure within the State
- Establish port district board appointment process within IDOT



NEXT STEPS for IMTS Plan

- **Early August: Draft Plan to Steering Committee for Review & Comment (2-week review)**
- **Late August/September: Address/Respond to Steering Committee Comments**
- **September: Release Draft Plan and Overview PowerPoint for Broad Stakeholder Review (30 – day review)**
- **October: Address/Respond to Comments**
- **November: Publish Final Plan**



Thank You

Additional Questions?

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